

PX-37

Message

From: Jim Kolotouros [jimk@google.com]
Sent: 6/8/2019 5:29:51 PM
To: Jamie Rosenberg [jamiero@google.com]
CC: Donald Harrison [harrison@google.com]; Sameer Samat [ssamat@google.com]; Christopher Li [lichristopher@google.com]; Kate Lee [katelee@google.com]; jinyoungbaik [jinyoungbaik@google.com]
Subject: Re: Notes from Samsung / Play / IAP conversation

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They would align on IAP as well...

On Sat, Jun 8, 2019 at 10:28 AM Jamie Rosenberg <jamiero@google.com> wrote:
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Thanks, Jim.

You mentioned in our IM chat yesterday that Samsung broached the topic of asking for rev share on the Play Store. Did they offer what they would give in return for that?

On Sat, Jun 8, 2019 at 10:22 AM Jim Kolotouros <jimk@google.com> wrote:
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Don/Sameer/Jamie:

Last night Chris, Jinyoung and I had a call with Samsung (Jay Kim & Seung) to discuss our Play Store proposal. The notes are here.

Long story short: They are committed to developing a financial relationship with developers to enhance the fundamental economics of their mobile hardware business. They think that gaming in particular is a vertical that would yield good economics.

I think our trip next week will be productive, if for no other reason than we can have honest discussions about how to align moving forward while also achieving Hiroshi's goal of bringing them closer to us.

Some very important points:

- Chris has pre-flighted with Samsung that we want the MADA renewal to be free of friction. He noted that we're looking to do an "as is" extension with a short amendment to cover a limited number of items (e.g., pre-load policy, GMS expiration on old letter versions, hardware affordance). Chris will publish more detailed notes of their initial reactions before we jump on a plane.
- In fact, we DO have a short-term AFA in place that was executed concurrent to the Becker deals. So the risk that I had thought was there is in fact not present. So we have that going for us. We will still push hard on getting the ACC in place and digging deep on the non-supported form factor exceptions they'd like.
- We have not brought up search revenue share (RSA) at all. I think it will and should come up in our meetings on Tuesday as part of a broader plan for alignment. And I'd like us to align on the potential message of "alot of the things that we valued and included in revenue share 2 years ago are things that we do not believe are as important within the context of a revenue share deal... we don't think you made any changes to

letter/search update cadence/frequency at all, so why include it in RSA (since it doesn't alter behavior)? Daydream? search exclusivity (especially in Europe where so much revenue flows and in a choice screen world?), etc.,")

Happy to discuss before jumping on a plane on Sunday night.

thanks.